

Memorandum

To: Carissa Binkley, Economic Vitality Program Analyst, Town of Truckee
Hilary Hobbs, Assistant Town Manager, Town of Truckee

From: Aaron Nousaine, MCRP, Principal, BAE Urban Economics
Seana Doherty, Senior Manager, Agnew::Beck

Date: May 29, 2026

Re: Revised Scope and Budget for the Truckee Economic Vitality Strategic Plan

The following is a revised scope of work for the Truckee Economic Vitality Strategic Plan that incorporates adjustments that were discussed and agreed upon by Town staff and BAE Urban Economics (BAE). The purpose of these adjustments is to reduce the total project cost to align with the Town's available resources.

Task 1 – Project Management and Coordination

Per the RFP, Task 1 includes assorted project management and coordination activities, including project initiation and ongoing project administration and coordination. While both BAE and Agnew::Beck acknowledge and respect the need for clear and ongoing communication between the consultant team and Town staff, excessive coordination can, in some cases, divert scarce resources away from project implementation. The budget for this task includes the activities requested in the RFP, though the team expects that reducing the level of effort here could further reduce costs with little impact on project quality or execution.

Task 1.1 – Project Initiation & Work Plan

BAE will coordinate with Agnew::Beck and Town staff to facilitate a kickoff meeting no later than one-month following contract execution. The purpose of the meeting will be to review and refine the project work plan (which should already have been refined somewhat through negotiations prior to contract signing), schedule, and budget. The consultant team will aim to collect more information on the Town's objectives for the Economic Vitality Strategic Plan, and to identify any potential pitfalls or risk areas that should be accounted for. At the kickoff meeting, Agnew::Beck will also provide a high-level review of the preliminary approach to community engagement and will receive feedback prior to delivery of the draft engagement plan. The consultant team will

request a list of key contacts and stakeholders, as well as relevant contact information, as appropriate. As part of the schedule discussion, the consultant team will highlight key milestones and timing for key deliverables. Following completion of the kickoff meeting, BAE will circulate meeting notes, as well as an annotated copy of the scope of work and a revised project schedule.

Deliverables: Meeting notes; annotated work scope; revised project schedule.

Task 1.3 – Project Administration

Pursuant to execution of the above subtasks, BAE will prepare assorted materials as needed to prepare for meetings, such as agendas, updated schedules, etc. The budget for this task assumes up to 1.3 hours per month for assorted project administration.

Deliverable: Agendas, emails, phone calls, and other materials, as needed.

Task 2 – Document Review, GAP Analysis & Town Role Definition

Under this task, BAE will review relevant background materials, and will prepare a gap analysis and an administrative capacity assessment.

Task 2.1 – Document Review

As a first step towards preparation of the Economic Vitality Strategic Plan, BAE staff will review the following background materials:

- Truckee 2040 General Plan
 - o Non-Residential Market Analysis Background Report
 - o Economic Development Element
- Chamber of Commerce Partnership Contract
- Truckee River Revitalization (R3) Playbook
- Visit Truckee-Tahoe (VTT) Strategic Plan
- 2024 Economic Impact of Travel (Truckee, California)
- Sierra Economic Development District Comprehensive Economic Development Strategy (CEDS) 2023-2027
- Culture Forward Nevada County Arts and Culture Action Plan 2026-2032

Task 2.2 – GAP Analysis & Capacity Assessment

Based on the review of relevant background materials conducted under Task 2.1, BAE will assess the existing economic development toolkit, and the existing program and partnership landscape, and will prepare a brief gaps analysis summarizing the relative alignment of the Town’s existing economic development framework and anticipated community needs. The gaps analysis will, however, only be preliminary, as additional insight is expected to be gained through the community outreach process, including interviews and focus groups. This preliminary analysis will, therefore, identify preliminary points of interest which can then be further evaluated under future tasks. Per the RFP, one key point of consideration under this task will be the extent to which the existing program inventory can be reasonably managed by the one existing economic development staffer, or whether additional resources are needed, either in terms of supplemental staffing or through strategic partnerships.

Deliverable: Gap analysis; part of the Task 2 memorandum.

Task 2.3 – Town Role Definition & Peer Insights

Based on information collected as part of the gap analysis, BAE will provide a brief summary of the Town’s existing and anticipated ideal future role in economic vitality, as well as the role of key strategic partners versus the market at large. As part of this subtask, BAE will provide a brief synopsis of up to three potentially relevant governance and staffing models, which will be identified in collaboration with Town staff.

Deliverable: Town role framework and governance and staffing synopses; part of the Task 2 memorandum.

Task 3 – Stakeholder & Community Engagement

The stakeholder and community engagement strategy for the Economic Vitality Strategic Plan will be led by the Senior Manager with Agnew::Beck, who has long-standing connections with the business and non-profit community throughout the Truckee-North Tahoe region. The following summarizes key components of the planned stakeholder and community engagement process; however, additional specifics will be detailed as part of the formal engagement plan prepared under Task 3.1 in consultation with Town staff.

Task 3.1 – Engagement Plan Development

A::B will design and implement a stakeholder and community engagement strategy to inform development of the Economic Vitality Strategy. Engagement will focus on gathering input from a diverse range of stakeholders, including local businesses,

community organizations, residents, and regional partners. Led by A::B, the consultant team will:

- Develop community engagement plan in consultation with Town staff.
- Identify the most appropriate outreach methods for each target stakeholder group, such as workshops, board meeting attendance, etc.
- Partner, where appropriate, with trusted community organizations.
- Work with Town staff to ensure the outreach plan meets Inclusion, Diversity, Equity, and Accessibility (IDEA) goals, including:
 - Spanish-language translation services for written materials and in-person engagements, **to be provided by Town staff** with a minimum of two weeks advance notice.
 - Ensuring engagement opportunities are accessible to a broad range of participants, including business owners, employees, and residents who may have limited availability during traditional business hours.
 - Reach underrepresented groups.

Deliverable: Community and stakeholder engagement plan.

Task 3.2 – Stakeholder Interviews & Targeted Outreach

A::B will coordinate up to 10 one-on-one stakeholder interviews with representatives from key business cohorts, including local businesses, business-serving organizations, property owners, community-based organizations, housing partners, and regional economic development stakeholders including, but not limited to:

- Visit Truckee-Tahoe
- Truckee Chamber of Commerce
- Truckee Downtown Merchants Association (TDMA)
- Contractors Association of Truckee-Tahoe (CATT).
- Truckee Arts Alliance & Truckee Cultural District

A::B will organize and participate in all 10 interviews. The budget for this task allows for Principal level staff with BAE to participate in up to five of the 10 interviews, with one hour of additional time to assist with preparation of the interview guide. Additional interviews may be conducted, as needed, at an additional cost. The consultant team will also

consider notes and summaries from other interviews conducted by Town staff, members of the Chamber of Commerce, and other relevant background material.

Deliverable: Summary of key interviews and key themes; part of the Task 3 summary memorandum.

Task 3.3 – Community Engagement Activities

Facilitate workshops, focus groups, and/or surveys (as determined in Task 3.1) to include:

- Business Focus Groups: The consultant team will facilitate two small group discussions with Truckee business owners representing different sectors (e.g., retail, service, industrial, and recreation-based businesses), which will be organized by Town staff (i.e., participant identification and recruitment, venue and refreshments, etc.).
- Community Workshop(s): The consultant team will facilitate one in-person community workshop to gather input on economic vitality priorities, which will be organized by Town staff (i.e., participant identification and recruitment, venue and refreshments, etc.) and which may leverage the existing event schedule (e.g., Town Talk, Learning Lunch, etc.).

Deliverable: summary of engagement activities and key themes; part of the Task 3 summary memorandum.

Task 4 – Prioritization Framework

Under this task, the consultant team will inventory the potential actions identified under Tasks 2 and 3, and will develop a prioritization rubric in consultation with Town staff.

Task 4.1 – Development of Prioritization Criteria

Considering the industry segmentation and entrepreneurial ecosystem summarized under Task 2, and input from the business community collected under Task 3, BAE will compile a list of potential economic vitality actions that address the identified needs of the community. The next step will be to prepare criteria with which to prioritize the actions into an implementable strategic work plan. While the final prioritization rubric will be developed in consultation with Town staff and key stakeholders, possible themes may include topics like economic impact, alignment with community identity, housing/workforce compatibility, seasonality and resilience, feasibility and town capacity, leverage and partnerships, private sector readiness, and process legitimacy, among other options.

Deliverable: Prioritization criteria summary table; part of the prioritization framework memorandum.

Task 4.2 – Application of Framework

Under this task, BAE will apply the prioritization framework prepared under Task 4.1 to the economic vitality actions inventory and will summarize the prioritization matrix.

Deliverable: Completed prioritization matrix; part of the prioritization framework memorandum.

Task 5 – Business Success Model & Strategy Development

The following subtasks include a review of the existing business startup and support framework, followed by a review of best practices, and recommendations for development of a high-quality, tailored, business success program.

Task 5.1 – Review of Current Business Startup & Support Process

Drawing on findings already gathered in Tasks 2 and 3, this subtask reviews the current state of business support, including programs provided by the Town of Truckee and other organizations. Under this Task, BAE will evaluate available information pertaining to:

- What information and guidance is currently available to help businesses navigate the startup and expansion process.
- What are the gaps and redundancies in the existing business support model?
- What are the pain points and areas of confusion identified by businesses?

Deliverable: Existing business support process assessment summary; part of the business success model and strategy development memorandum.

Task 5.2 – Peer & Best Practices Review

Under this task, BAE will use the gaps and pain points identified in Task 5.1 as a guide to identify up to four peer communities or key service models to research to inform a Business Success Program for Truckee. BAE will work with Town staff and stakeholders to identify peer communities and/or representative service models that have shown demonstrated effectiveness. Potential options may include, but are not limited to:

- Business Visitation / Relationship Programs
- Concierge or ombuds-style navigation
- Peer Referral / Business Ambassador Programs

- Small Business Development Center (SBDC) or SCORE Partnerships
- Joint Town–Chamber coordination models
- Permit facilitation or small business technical assistance programs
- Pop-Up and Temporary Use Programs
- Online / Self-Service Resource Portals
- Sector-Based or Cluster Programs
- Business Incubators and Accelerators

Research into the identified peer communities and/or service models will be conducted by Town staff, who will provide a brief summary to BAE for incorporation into the Task 5.3 roadmap.

Deliverable: Identification of up to four peer communities and/or service models to be researched by Town staff with findings to be incorporated into the Task 5.3 deliverables.

Task 5.3 – Business Success Program Roadmap

Drawing on the assessment findings from Task 5.1 and the peer and best practice review completed in Task 5.2, BAE will develop a tailored Business Success Program Roadmap. The roadmap will provide a practical, actionable framework for program implementation that is calibrated to Truckee's business community needs, organizational capacity, and available resources. Specifically, the roadmap will address:

- **Program structure and service model** – Define the recommended program architecture, including core service offerings, delivery mechanisms, and the populations or business segments to be served (e.g., startups, expanding businesses, specific sectors).
- **Institutional roles and responsibilities** – Clarify the respective roles of the Town of Truckee, the Truckee Donner Chamber of Commerce, the regional SBDC, and other partner organizations, including lead versus supporting roles, referral protocols, and coordination mechanisms.
- **Phased implementation plan** – Outline a sequenced approach to program launch and scaling, identifying near-term quick wins, medium-term buildout priorities, and longer-term program enhancements.
- **Resource and capacity requirements** – Identify staffing, budget, technology, and partnership investments needed to implement the program, including options for phased resource deployment that

reflect Town fiscal and administrative capacity, as articulated by the Town.

- **Performance metrics and evaluation framework** – Establish clear, measurable indicators of program effectiveness, such as number of businesses served, time-to-permit benchmarks, business retention rates, and user satisfaction, along with data collection methods.

Deliverable: Business Success Program Roadmap; part of the business success model and strategy development memorandum.

Task 6 – Action Prioritization, Phasing & Implementation

The following subtasks translate the strategic priorities and program recommendations developed in prior tasks into a structured, implementation-ready action plan. The action plan is designed to be realistic given current Town staffing and fiscal capacity, while also identifying a set of reach goals achievable with additional resources.

Task 6.1 – Action Development

BAE will develop a set of clearly defined recommended actions aligned with the Strategic Plan's priority areas, as identified under Task 4. BAE will briefly summarize the following for each action:

- **Purpose and intended outcome** – A concise statement of what the action is designed to accomplish and how it advances a stated strategic priority.
- **Lead and supporting entities** – Designation of the primary responsible party (e.g., Town of Truckee, Chamber of Commerce, SBDC) and supporting organizations, with notation of coordination or referral relationships.
- **Key implementation steps** – A summary of the major activities required to advance the action from initiation to completion.
- **Policy or regulatory considerations** – Identification of needed policy changes, ordinance amendments, or regulatory modifications.
- **Program development needs** – Description of any new services or internal processes that would need to be created or significantly modified.
- **Third-party contracting needs** – Are actions likely to require procurement of outside services, technical assistance providers, or specialized expertise.

- **Order-of-magnitude resource requirements** – A high-level estimate of the budget and partnership resources needed to implement the action.

Task 6.2 – Staffing & Resource Alignment

BAE will evaluate each recommended action against current Town staffing, noting that economic vitality functions are currently supported by a single dedicated position. Actions will be categorized to distinguish between those that are feasible within current capacity, those that represent a stretch given existing workload, and those that would require additional staffing, contracted support, or partnership resources.

Deliverable: Prioritization and Implementation memorandum section.

Task 6.3 – Phasing & Early Wins

BAE will organize recommended actions into a phased implementation framework based on available capacity, resources, and anticipated complexity, distinguishing between near-term actions (Years 0–2), mid-term actions (Years 2–5), and long-term initiatives (Years 5+).

Deliverable: Prioritization and Implementation memorandum section.

Task 7 – Prepare Economic Vitality Strategic Plan

This task synthesizes the materials prepared under prior tasks to produce a draft and final Economic Vitality Strategic Plan for the Town of Truckee and to present the recommendations to the Town Council.

Task 7.1 – Draft Plan Preparation

Upon completion of Tasks 1–6, BAE will prepare an administrative draft Economic Vitality Strategic Plan integrating the findings, analysis, and recommendations developed across all prior tasks. The plan will be structured for both readability and utility; serving as a policy document for elected officials and a working implementation guide for Town staff and businesses, including both implementation actions and performance metrics, as described above. Upon receipt of one consolidated set of comments on the administrative draft from Town staff, BAE will revise the document and provide a Public Review Draft for review by decision makers and the community at large. Town staff will be responsible for collecting and consolidating comments on the public review draft and will provide BAE with one set of consolidated comments upon close of the review period.

Deliverable: Administrative Draft Economic Vitality Strategic Plan (Word and PDF); Public Review Draft Economic Vitality Strategic Plan (PDF).

Task 7.2 – Final Plan Preparation

Upon receipt of one consolidated set of comments on the public review draft Economic Vitality Strategic Plan, BAE will revise and prepare the final document, which will be provided to the Town in both Adobe PDF and Microsoft Word.

Deliverable: Final Economic Vitality Strategic Plan (Word and PDF).

Task 7.3 – Town Council Presentation

BAE and Agnew::Beck will prepare and deliver one presentation to the Town Council. The presentation will summarize the planning process, key findings, strategic priorities, and recommended actions, and will be designed to facilitate informed Council deliberation.

Deliverable: Presentation to the Truckee Town Council.

FEE PROPOSAL

The BAE/A::B team proposes to complete the above scope of work on a percent complete basis for a fixed fee of \$59,945, as summarized in Table 1, on the following page. Hourly rates are subject to revision on or after January 1, 2027. BAE will submit invoices on behalf of the client team on a monthly basis, including detail regarding staff hours by worker classification by task, and a brief (i.e., 2-3 sentences or bullet points, as needed) description of the work completed during the billing period.

Table 1: Revised Project Budget

Task	BAE Urban Economics			Agnew Beck			Total Budget
	Principal	Associate		Senior Manager	Associate		
<i>hourly rates</i>	\$320	\$180		\$200	\$175		
Task 1 – Project Management & Coordination	10	0	\$3,200	8	0	\$1,600	\$4,800
1.1 – Project Initiation & Work Plan	2		\$640	2		\$400	\$1,040
1.3 – Project Management & Administration	8		\$2,560	6		\$1,200	\$3,760
Task 2 – Econ. Profile, GAP Analysis & Roles	22	8	\$8,480	4	0	\$800	\$9,280
2.1 – Document Review & Economic Analysis	6		\$1,920			\$0	\$1,920
2.2 – GAP Analysis & Capacity Assessment	12		\$3,840			\$0	\$3,840
2.3 – Town Role Definition & Peer Insights	4	8	\$2,720	4		\$800	\$3,520
Task 3 – Stakeholder & Community Engagement	13	3	\$4,540	13	26	\$7,150	\$11,690
3.1 – Engagement Plan Development	0.5		\$160	6		\$1,200	\$1,360
3.2 – Stakeholder Interviews & Targeted Outreach	6		\$1,920	5	12	\$3,100	\$5,020
3.3 – Community Engagement Activities	6	3	\$2,460	2	14	\$2,850	\$5,310
Business Focus Group(s)	2		\$640	1	8	\$1,600	\$2,240
Community Workshop	4	3	\$1,820	1	6	\$1,250	\$3,070
Task 4 – Prioritization Framework	8	0	\$2,560	4	1	\$975	\$3,535
4.1 – Development of Prioritization Criteria	4		\$1,280	2		\$400	\$1,680
4.2 – Application of Framework	4		\$1,280	2	1	\$575	\$1,855
Task 5 – Business Success Model & Strategy	18	12	\$7,920	1	0	\$200	\$8,120
5.1 – Review of Current Business Supports	6	8	\$3,360			\$0	\$3,360
5.2 – Peer & Best Practice Review	4	4	\$2,000			\$0	\$2,000
5.3 – Business Success Program Roadmap	8		\$2,560	1		\$200	\$2,760
Task 6 – Action Prioritization & Phasing	26	12	\$10,480	6	0	\$1,200	\$11,680
6.1 – Action Development	18	8	\$7,200	2		\$400	\$7,600
6.2 – Staffing & Resource Alignment	4		\$1,280	2		\$400	\$1,680
6.3 – Phasing & Early Wins	4	4	\$2,000	2		\$400	\$2,400
Task 7 – Prepare Economic Vitality Strategic Plan	22	0	\$7,040	12	8	\$3,800	\$10,840
7.1 – Draft Plan Preparation	8	0	\$2,560	8	4	\$2,300	\$4,860
7.2 – Final Plan Preparation	8		\$2,560	2	2	\$750	\$3,310
7.3 – Town Council Presentation	6		\$1,920	2	2	\$750	\$2,670
Totals, Excluding Optional Tasks	\$37,920	\$6,300	\$44,220	\$9,600	\$6,125	\$15,725	\$59,945